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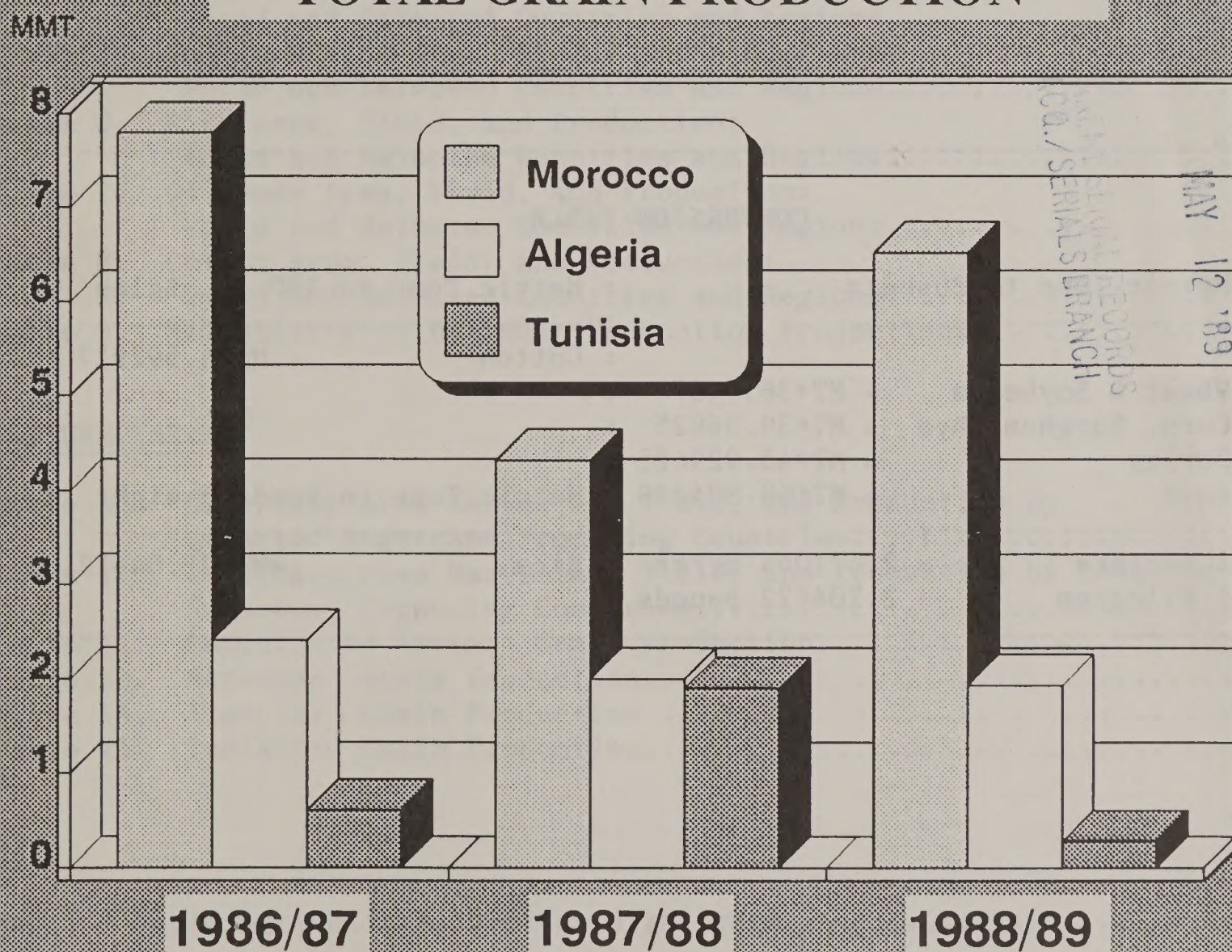
United States
Department of
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Foreign
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Circular Series
WAP 12-88
December 1988

World Agricultural Production

NORTHWEST AFRICA TOTAL GRAIN PRODUCTION



Inside This Issue.....

World Sugar Production
Grain Production In Northwest Africa
South Korea: Grain Production Situation
Saudi Arabia: Barley Production Encouraged

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. All numbers in this report are based on unrounded data and detail may not add to totals because of rounding.

This report was prepared by the Foreign Production Estimates Division (FPED), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888.

 * The next issue of World Agricultural Production will be released at 3 p.m. *
 * eastern time on January 17, 1988. *

:			:
:	CONVERSION TABLE		:
:			:
:	Metric Tons to Bushels	:	Metric Tons to 480-lb. Bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & Soybeans = MT*36.7437	:	
:	Corn, Sorghum, Rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric Tons to Hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	

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PRODUCTION HIGHLIGHTS FOR 1988/89

WHEAT: World production for 1988/89 is estimated at 502.5 million metric tons, up 0.4 million or less than 1 percent from last month, but down less than 1 percent from last year's harvest. Important changes from a month ago include the following:

- o Morocco Production is estimated at a record 4.0 million tons, up 0.8 million or 24 percent from last month and up 66 percent from last year's drought-affected harvest. The increase is due to the adoption of official Moroccan statistics.
- o East Europe Production is estimated at 45.1 million tons, up 0.7 million or 2 percent from last month and up 13 percent from last year. Estimated wheat yield in Czechoslovakia has been increased.
- o Saudi Arabia Production is estimated at a record 2.8 million tons, up 0.3 million or 12 percent from last month and up 17 percent from last year. The increase is attributed to higher estimated area.
- o EC-12 Production is estimated at 75.8 million tons, down 1.0 million or 1 percent from last month, but up 6 percent from last year. Estimates were reduced for Greece, Italy, and Spain.
- o Argentina Production is estimated at 7.4 million tons, down 0.4 million or 5 percent from last month and down 18 percent from last year. Yields are estimated lower due to hot, dry weather during November in the principal production areas.

COARSE GRAINS: World production for 1988/89 is estimated at 712.7 million tons, up 2.7 million or less than 1 percent from last month, but down 10 percent from last year. Important changes from a month ago include the following:

- o India Production is estimated at 32.5 million tons, up 2.7 million or 9 percent from last month and up 41 percent from last year. Barley output is estimated at 1.9 million tons, up 0.1 million; corn output is estimated at 7.9 million tons, up 0.4 million; millet output is estimated at 11.2 million tons, up 0.7 million; and sorghum output is estimated at 11.5 million tons, up 0.5 million. The excellent monsoon season boosted coarse grain production estimates in all major growing regions.

- o Morocco Production is estimated at 3.9 million tons, up 0.7 million or 21 percent from last month and up 110 percent from last year's drought-reduced crop. The increase reflects adoption of official Moroccan statistics for barley and corn.
- o Canada Production is estimated at 19.6 million tons, up 0.5 million or 3 percent from last month, but down 23 percent from last year. Yield estimates for all coarse grains are up this month based on official Statistics Canada figures.
- o Turkey Production is estimated at 9.6 million tons, up 0.3 million tons or 3 percent from last month and up 3 percent from last year. The increase is attributed to higher estimated barley yield.
- o Nigeria Production is estimated at 8.5 million tons, up 0.2 million or 2 percent from last month and up 25 percent from last year. The increase is due to higher estimated corn area.
- o Argentina Production is estimated at 12.4 million tons, down 1.7 million or 12 percent from last month and down 5 percent from last year. Substantial decreases are estimated for corn and sorghum area due to reduced price incentives and periods of hot, dry weather during planting. Lower oat production is estimated due to cold, dry winter weather and use of oats as cattle forage rather than grain.
- o EC-12 Production is estimated at 88.1 million tons, down 0.5 million or less than 1 percent from last month, but up 7 percent from last year. Barley estimates were reduced for Denmark, France, and Spain, but were largely offset by higher corn estimates for France and Greece.
- o Australia Production is estimated at 7.2 million tons, down 0.2 million or 3 percent from last month, but up 7 percent from last year. Unfavorable spring weather has reduced yield prospects for oats and barley in eastern Australia.

RICE (MILLED-BASIS): World production for 1988/89 is estimated at 320.4 million tons, virtually unchanged from last month, but up 4 percent from the 1987/88 crop. Foreign production in 1988/89 is the second largest on record and is projected at 315.4 million tons, an increase of 10.4 million or 3 percent from 1987/88.

OILSEEDS: World production for 1988/89 is forecast at 201.1 million tons, up less than 1 percent from last month, and down 5.3 million or 3 percent from last year's record output. U.S. production is forecast at 49.1 million tons, up marginally from last month and down 19 percent from last year. Foreign production is forecast at a record 152 million tons, up slightly from last month and up 6.2 million or 4 percent 152.0 from last year.

- ★ **Soybeans:** World production for 1988/89 is forecast at 94.3 million tons, up slightly from last month, but down 8 percent from last year. Significant changes from last month include the following:

- o **India** Production is estimated at 1.3 million up 0.2 million or 18 percent from last month and up 63 percent from last year. Excellent monsoon rainfall in Madhya Pradesh boosted yield prospects.

- ★ **Cottonseed:** World production for 1988/89 is forecast at 32.4 million tons, up slightly from last month and up 1.5 million or 5 percent from last year. Significant changes from last month include the following:

- o **United States** Production is estimated at 5.4 million tons, up 3 percent from last month and up 3 percent from last year. The increase is based on larger crop prospects in Texas.

- o **India** Production is estimated at 3.6 million tons, down 0.2 million or 5 percent from last month and down 0.5 million from last year. The reduction is based on a downward revision in cotton production because of prolonged dryness in the Andra Pradesh and Gujarat states.

- o **USSR** Production is estimated at 5.0 million tons, up 0.1 million or 3 percent from last month and up 0.5 million or 12 percent from last year. Excellent weather conditions during the growing and harvesting seasons have benefited production.

- ★ **Peanuts:** World production for 1988/89 is forecast at 22.0 million tons, up 2 percent from last month and up 12 percent from last year. Significant changes from last month include the following:

- o **India** Production is estimated at a record 7.3 million tons, up 0.5 million or 7 percent from last month and up 52 percent from last year. A large summer harvest in Gujarat state, as well as excellent soil moisture in southern winter production areas has created prospects for a record crop.

* **Sunflowerseed:** World production for 1988/89 is forecast at 21.3 million tons, down marginally from last month, but up 3 percent from last year. Significant changes this month include the following:

o **Argentina**

Production is estimated at 3.2 million tons, down 0.1 million or 3 percent from last month, but up 14 percent from last year. The reduction is based on decreased estimated area due to hot, dry planting weather during November in some principal sunflowerseed production regions.

* **Rapeseed:** World production for 1988/89 is estimated at 21.8 million tons, up marginally from last month and down 1.2 million or 5 percent from last year.

* **Flaxseed:** World production for 1988/89 is estimated at 1.8 million tons, down marginally from last month and down 21 percent from last year.

* **Copra:** World production for 1988/89 is estimated at 4.7 million tons, unchanged from last month, but up 0.3 million tons from last year.

* **Palm Kernels:** World production for 1988/89 is forecast at 2.9 million tons, unchanged from last month, but up 0.2 million or 8 percent from last year.

* **Palm Oil:** World production for 1988/89 is forecast at 9.3 million tons, unchanged from last month, but up 0.7 million or 9 percent from last year.

COTTON: World production for 1988/89 is estimated at 84.3 million bales, up 0.3 million or less than 1 percent from last month, and up 5 percent from 1987/88. Foreign production is estimated at 69.1 million bales, virtually unchanged from last month, but up 5 percent from last season.

o **United States**

Production is estimated at 15.2 million bales, up 0.4 million or 2 percent from last month and up 3 percent from last year. Increased production is estimated due to larger crop prospects in Texas.

o **USSR**

Production is estimated at 12.7 million bales, up 0.3 million or 2 percent from last month and up 12 percent from last year's poor crop. Increased production is estimated due to favorable weather during the growing and harvesting seasons. Recent procurement data also support increased production.

o Greece

Production is estimated at a record 1.0 million bales, down 80,000 bales or 7 percent from last month, but up 26 percent from last year. The decrease in production is due to lower yields.

o Syria

Production is estimated at 715,000 bales, up 0.1 million or 19 percent from last month and up 46 percent from last year's weather-reduced crop. The increased output is due to both favorable prices which led to a sharp increase in plantings and favorable weather during the growing and harvesting seasons.

o India

Production is estimated at 8.2 million bales, down 0.4 million or 5 percent from last month, but up 17 percent from last year's poor crop. Decreased output is estimated due to prolonged dryness in Gujarat and Andra Pradesh coupled with problems associated with white fly infestation.

Table 1

U.S. Crop Acreage, Yield, and Production 1/

Commodity	--Harvested Area--			--Yield--				--Production--			
	Prel.		Proj.	Prel.		1988/89 Proj.		Prel.		1988/89 Proj.	
	1986/87	1987/88	1988/89	1986/87	1987/88	Nov.	Dec.	1986/87	1987/88	Nov.	Dec.
	--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	60.7	56.0	53.3	34.4	37.7	34.0	34.0	2,092	2,107	1,812	1,812
Winter	43.2	39.3	39.8	35.2	39.8	39.2	39.2	1,521	1,565	1,561	1,561
Other	17.5	16.6	13.5	32.6	32.7	18.6	18.6	571	542	251	251
Rye	0.7	0.7	0.6	28.8	29.0	24.8	24.8	20	20	15	15
Soybeans	58.3	57.0	56.8	33.3	33.7	26.6	26.6	1,940	1,923	1,512	1,512
Corn	69.2	59.2	56.7	119.2	119.4	82.3	82.3	8,250	7,064	4,671	4,671
Sorghum	13.9	10.6	9.0	67.7	69.9	60.6	60.6	938	741	546	546
Barley	12.0	10.1	7.4	50.7	52.6	38.2	38.2	611	530	283	283
Oats	6.9	6.9	5.4	56.3	54.0	39.1	39.1	386	374	211	211
	--Million Hectares--			--Metric Tons per Hectare--				--Millions of Metric Tons--			
Total Feedgrains	41.3	35.1	31.8	6.1	6.1	4.5	4.5	252.3	215.2	141.7	141.7
	--Million Acres--			--Pounds per Acre--				---Million CWT.---			
Rice	2.4	2.3	2.9	5,651	5,482	5,547	5,547	133.4	127.7	158.4	158.4
								---Million 480-Pound---			
All Cotton	8.5	10.0	11.6	551	706	612	627	9.7	14.8	14.8	15.2

Table 2

U.S. Planted Area of Major Crops

Year	Wheat			Feedgrains							All		Total Maj
	Winter	Other	Total	Rye	Rice	Corn	Sorghum	Barley	Oats	Total	Soybeans	Cotton	Crops
	--Million Acres--												
1986/87	54.0	18.1	72.1	2.4	2.4	76.7	15.3	13.1	14.7	119.7	60.4	10.0	267.0
1987/88 Prel.	48.8	17.0	65.8	2.5	2.4	65.7	11.8	11.0	18.0	106.5	58.0	10.4	245.5
1988/89 Proj.													
November	48.8	16.9	65.7	2.4	2.9	67.5	10.5	9.7	13.9	101.6	58.8	12.2	243.6
December	48.8	16.9	65.7	2.4	2.9	67.5	10.5	9.7	13.9	101.6	58.8	12.2	243.6

1/ Estimates from USDA Agricultural Statistics Board.

Table 3

World Crop Production Summary

Commodity	World		North America		Europe		USSR		Asia		South America		Selected Other Countries		All Other Countries
	1986/87	1987/88	1986/87	1987/88	1986/87	1987/88	1986/87	1987/88	1986/87	1987/88	1986/87	1987/88	1986/87	1987/88	
	473.3	473.3	56.9	56.9	31.4	31.4	4.5	4.5	72.0	72.0	4.3	4.3	39.1	39.1	92.3
	447.0	447.0	57.4	57.4	26.0	26.0	3.7	3.7	71.5	71.5	4.0	4.0	39.8	39.8	83.3
	452.7	452.7	49.3	49.3	15.5	15.5	3.2	3.2	76.8	76.8	3.7	3.7	44.4	44.4	88.0
	453.2	453.2	49.3	49.3	15.7	15.7	3.2	3.2	75.8	75.8	3.7	3.7	45.1	45.1	88.0
	834.8	834.8	252.8	252.8	25.5	25.5	14.9	14.9	81.7	81.7	12.3	12.3	73.9	73.9	105.9
	790.5	790.5	215.7	215.7	25.5	25.5	14.5	14.5	82.3	82.3	11.5	11.5	64.6	64.6	113.7
	710.0	710.0	142.1	142.1	19.1	19.1	14.9	14.9	88.6	88.6	11.1	11.1	62.0	62.0	98.0
	712.7	712.7	142.1	142.1	19.6	19.6	14.9	14.9	88.1	88.1	11.1	11.1	61.9	61.9	98.0
	318.4	318.4	4.3	4.3	0.0	0.0	0.4	0.4	1.3	1.3	0.0	0.0	0.2	0.2	1.7
	309.0	309.0	4.1	4.1	0.0	0.0	0.4	0.4	1.3	1.3	0.0	0.0	0.2	0.2	1.7
	320.5	320.5	5.0	5.0	0.0	0.0	0.3	0.3	1.3	1.3	0.0	0.0	0.2	0.2	1.8
	320.4	320.4	5.0	5.0	0.0	0.0	0.3	0.3	1.3	1.3	0.0	0.0	0.2	0.2	1.8
	1,683.4	1,683.4	314.0	314.0	56.9	56.9	19.7	19.7	155.0	155.0	16.6	16.6	113.2	113.2	199.9
	1,603.8	1,603.8	277.1	277.1	51.5	51.5	18.6	18.6	155.1	155.1	15.5	15.5	104.7	104.7	198.7
	1,532.5	1,532.5	196.5	196.5	34.6	34.6	18.3	18.3	166.7	166.7	14.8	14.8	106.7	106.7	187.8
	1,535.6	1,535.6	196.5	196.5	35.3	35.3	18.3	18.3	165.2	165.2	14.8	14.8	107.2	107.2	187.8
	194.3	194.3	59.4	59.4	5.8	5.8	1.0	1.0	8.4	8.4	0.5	0.5	6.0	6.0	11.2
	206.4	206.4	60.6	60.6	5.9	5.9	1.2	1.2	12.1	12.1	0.5	0.5	5.3	5.3	11.8
	200.3	200.3	49.0	49.0	5.8	5.8	0.8	0.8	11.4	11.4	0.6	0.6	5.2	5.2	12.5
	201.1	201.1	49.1	49.1	5.9	5.9	0.8	0.8	11.5	11.5	0.6	0.6	5.2	5.2	12.7
	70.4	70.4	60.7	60.7	9.7	9.7	0.0	0.0	1.3	1.3	0.0	0.0	0.1	0.1	12.2
	80.5	80.5	65.7	65.7	14.8	14.8	0.0	0.0	1.2	1.2	0.0	0.0	0.1	0.1	11.3
	84.0	84.0	69.1	69.1	14.8	14.8	0.0	0.0	1.2	1.2	0.0	0.0	0.1	0.1	12.4
	84.3	84.3	69.1	69.1	15.2	15.2	0.0	0.0	1.2	1.2	0.0	0.0	0.1	0.1	12.7

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, and pulses are 210.1 million tons in 1986/87, 211.4 million in 1987/88, and 200.0 million forecast in 1988/89.

2/ Totals for major regions and countries and other countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for countries shown plus other countries.

Note: Entries of '0.0' indicate no reported or insignificant production.

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FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 4

Wheat Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel. Proj.			Prel. 1988/89 Proj.				Prel. 1988/89 Proj.			
	1986/87	1987/88	1988/89	1986/87	1987/88	Nov.	Dec.	1986/87	1987/88	Nov.	Dec.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	227.8	219.6	219.1	2.33	2.30	2.29	2.29	530.2	504.3	502.1	502.5
United States	24.6	22.6	21.6	2.32	2.53	2.29	2.29	56.9	57.4	49.3	49.3
Total Foreign	203.2	197.0	197.5	2.33	2.27	2.29	2.29	473.3	447.0	452.7	453.2
Maj. Foreign Exporters	46.1	43.3	41.9	2.79	2.75	2.69	2.67	128.4	118.9	113.1	111.8
Argentina	5.0	4.8	4.5	1.79	1.88	1.73	1.64	8.9	9.0	7.8	7.4
Australia	11.1	9.1	9.0	1.45	1.37	1.44	1.44	16.1	12.4	13.0	13.0
Canada	14.2	13.5	12.9	2.20	1.93	1.20	1.21	31.4	26.0	15.5	15.7
EC-12	15.7	15.9	15.4	4.58	4.50	4.93	4.91	72.0	71.5	76.8	75.8
Major Importers	98.1	95.5	98.0	2.40	2.36	2.38	2.40	235.5	225.3	233.5	235.0
Brazil	3.9	3.5	3.5	1.44	1.76	1.59	1.59	5.6	6.1	5.5	5.5
China	29.6	28.8	29.5	3.04	3.05	2.97	2.97	90.0	87.8	87.5	87.5
Eastern Europe	10.5	10.6	10.7	3.73	3.77	4.14	4.20	39.1	39.8	44.4	45.1
Egypt	0.5	0.6	0.6	3.80	4.23	4.20	4.20	1.9	2.4	2.5	2.5
Other N. Africa */	4.6	5.2	4.4	1.23	0.96	1.01	1.19	5.7	5.0	4.5	5.3
Japan	0.2	0.3	0.3	3.56	3.19	3.67	3.67	0.9	0.9	1.0	1.0
USSR	48.7	46.7	49.0	1.89	1.78	1.80	1.80	92.3	83.3	88.0	88.0
Other Foreign	59.0	58.2	57.6	1.85	1.77	1.84	1.85	109.3	102.8	106.2	106.4
India	23.0	22.8	22.2	2.05	2.00	2.03	2.03	47.1	45.6	45.0	45.0
Iran	6.3	6.1	6.3	1.14	0.98	1.08	1.08	7.1	6.0	6.8	6.8
Mexico	1.1	0.9	0.8	4.19	4.11	4.00	4.00	4.5	3.7	3.2	3.2
Non-EC W. Europe	1.0	0.9	0.8	4.51	4.20	4.63	4.63	4.3	4.0	3.7	3.7
Pakistan	7.4	7.7	7.3	1.89	1.56	1.73	1.73	13.9	12.0	12.6	12.6
South Africa	1.9	1.7	2.0	1.21	1.81	1.76	1.76	2.3	3.1	3.5	3.5
Turkey	8.7	8.7	8.8	1.61	1.49	1.71	1.71	14.0	13.0	15.0	15.0
Others	9.8	9.3	9.5	1.65	1.65	1.71	1.74	16.1	15.4	16.4	16.6

*/ Algeria, Libya, Morocco, and Tunisia.

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FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 5

Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel. Proj.			Prel. 1988/89 Proj.				Prel. 1988/89 Proj.			
	1986/87	1987/88	1988/89	1986/87	1987/88	Nov.	Dec.	1986/87	1987/88	Nov.	Dec.
TOTAL COARSE GRAINS 1/	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	337.1	323.1	323.3	2.48	2.45	2.20	2.20	834.8	790.5	710.0	712.7
United States	41.5	35.4	32.0	6.09	6.10	4.44	4.44	252.8	215.7	142.1	142.1
Total Foreign	295.5	287.8	291.3	1.97	2.00	1.95	1.96	582.0	574.8	567.8	570.6
Maj. Foreign Exporters	23.6	23.4	22.7	2.45	2.40	2.35	2.35	57.8	56.1	54.8	53.4
Argentina	4.5	4.4	4.2	2.88	2.98	2.94	2.92	13.0	13.0	14.1	12.4
Australia	4.3	4.6	4.8	1.56	1.48	1.54	1.51	6.8	6.8	7.4	7.2
Canada	7.8	8.0	7.2	3.26	3.21	2.66	2.73	25.5	25.5	19.1	19.6
South Africa	4.9	4.5	4.4	1.61	1.73	2.02	2.02	7.9	7.8	8.9	8.9
Thailand	2.0	2.0	2.1	2.25	1.51	2.55	2.55	4.6	3.0	5.3	5.3
Major Importers	108.5	108.2	106.3	2.67	2.66	2.60	2.59	289.9	288.1	276.1	275.4
Eastern Europe	18.6	18.1	18.5	3.97	3.56	3.35	3.35	73.9	64.6	62.0	61.9
EC-12	19.8	19.1	19.4	4.13	4.32	4.58	4.55	81.7	82.3	88.6	88.1
Other W. Europe	3.4	3.3	3.2	3.63	3.54	3.44	3.44	12.3	11.5	11.1	11.1
Mexico	7.7	7.8	7.8	1.93	1.87	1.89	1.89	14.9	14.5	14.9	14.9
USSR	58.6	59.5	57.0	1.81	1.91	1.72	1.72	105.9	113.7	98.0	98.0
Other Major Import. 2/	0.4	0.5	0.5	3.04	3.13	3.30	3.30	1.3	1.4	1.5	1.5
Other Foreign	163.5	156.2	162.3	1.43	1.48	1.47	1.49	234.3	230.6	237.0	241.8
Brazil	14.0	13.1	12.9	1.95	1.88	1.75	1.75	27.3	24.7	22.6	22.6
China	27.9	28.8	28.0	3.14	3.36	3.28	3.28	87.6	96.8	91.8	91.8
India	39.6	35.8	39.9	0.67	0.64	0.75	0.81	26.6	23.0	29.8	32.5
Indonesia	3.0	2.8	2.8	1.64	1.71	1.79	1.79	5.0	4.8	5.0	5.0
Nigeria	10.2	9.4	10.1	0.84	0.72	0.84	0.84	8.6	6.8	8.3	8.5
Philippines	3.6	3.8	3.8	1.13	1.15	1.16	1.16	4.0	4.3	4.4	4.4
Turkey	4.3	4.3	4.4	2.19	2.17	2.10	2.17	9.4	9.3	9.3	9.6
Others	60.9	58.3	60.4	1.08	1.05	1.10	1.12	66.0	60.9	65.8	67.4
BARLEY											
World	80.0	79.5	76.6	2.28	2.28	2.16	2.17	182.7	181.2	165.5	166.0
United States	4.9	4.1	3.0	2.74	2.83	2.06	2.06	13.3	11.5	6.2	6.2
Total Foreign	75.2	75.4	73.6	2.25	2.25	2.17	2.17	169.4	169.7	159.3	159.8
Australia	2.3	2.4	2.3	1.56	1.46	1.52	1.48	3.5	3.5	3.5	3.4
Canada	4.8	5.0	4.1	3.03	2.79	2.41	2.44	14.6	14.0	10.0	10.1
China	3.4	3.5	3.5	1.82	1.80	1.80	1.80	6.1	6.3	6.3	6.3
Eastern Europe	4.5	4.3	4.3	3.77	3.80	3.67	3.71	16.9	16.2	16.1	16.1
EC-12	12.7	12.2	12.4	3.69	3.82	4.19	4.12	46.7	46.6	51.8	51.1
Other W. Europe	1.8	1.8	1.8	3.38	3.12	3.13	3.13	6.2	5.5	5.5	5.5
Turkey	3.2	3.2	3.3	1.97	1.88	1.88	1.97	6.3	6.0	6.2	6.5
USSR	30.0	30.7	28.9	1.80	1.91	1.57	1.57	53.9	58.4	45.5	45.5
Others	12.6	12.4	13.0	1.20	1.06	1.12	1.18	15.2	13.2	14.4	15.3

FOOTNOTES AT END OF TABLE

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FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 5 (Continued)

Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---			
	Prel. Proj.			Prel. 1988/89 Proj.				Prel. 1988/89 Proj.			
	1986/87	1987/88	1988/89	1986/87	1987/88	Nov.	Dec.	1986/87	1987/88	Nov.	Dec.
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	129.4	124.0	124.4	3.69	3.59	3.10	3.10	477.2	445.2	386.0	386.1
United States	28.0	23.9	23.0	7.49	7.49	5.17	5.17	209.6	179.4	118.7	118.7
Total Foreign	101.4	100.1	101.4	2.64	2.65	2.64	2.64	267.6	265.7	267.3	267.4
Maj. Foreign Exporters	8.7	8.0	7.9	2.37	2.35	2.76	2.72	20.7	18.7	22.5	21.5
Argentina	2.9	2.6	2.6	3.19	3.46	3.39	3.33	9.3	9.0	9.5	8.5
South Africa	4.0	3.6	3.5	1.78	1.93	2.29	2.29	7.2	7.0	8.0	8.0
Thailand	1.8	1.8	1.9	2.37	1.56	2.70	2.70	4.3	2.7	5.0	5.0
Major Importers	22.0	21.9	22.5	4.03	3.78	3.78	3.79	88.9	82.9	85.0	85.0
Eastern Europe	7.6	7.3	7.5	5.13	4.10	3.87	3.85	38.9	29.9	28.8	28.7
EC-12	3.9	3.7	4.0	6.47	6.96	6.81	6.87	25.2	26.0	27.1	27.3
Other W. Europe	0.2	0.2	0.2	8.01	8.07	8.10	8.10	1.9	1.8	1.8	1.8
Mexico	6.0	6.0	6.1	1.67	1.65	1.69	1.69	10.0	9.9	10.3	10.3
USSR	4.2	4.6	4.6	2.96	3.24	3.59	3.59	12.5	14.8	16.5	16.5
Other Maj. Import. 2/	0.1	0.1	0.1	3.91	4.11	4.15	4.15	0.4	0.4	0.5	0.5
Other Foreign	70.6	70.2	71.1	2.24	2.34	2.26	2.26	158.0	164.1	159.8	160.9
Brazil	13.5	12.7	12.5	1.96	1.89	1.76	1.76	26.5	24.0	22.0	22.0
Canada	1.0	1.0	1.0	5.95	7.02	5.20	5.47	5.9	7.0	5.1	5.4
China	19.1	20.2	19.6	3.71	3.95	3.83	3.83	70.9	79.8	75.0	75.0
Egypt	0.8	0.8	0.8	4.73	5.14	5.00	5.00	3.9	4.2	4.1	4.1
India	5.9	5.3	5.9	1.27	1.04	1.27	1.34	7.5	5.5	7.5	7.9
Indonesia	3.0	2.8	2.8	1.64	1.71	1.79	1.79	5.0	4.8	5.0	5.0
Philippines	3.6	3.8	3.8	1.13	1.15	1.16	1.16	4.0	4.3	4.4	4.4
Zimbabwe	1.2	1.3	1.3	0.92	1.60	1.54	1.54	1.1	2.0	2.0	2.0
Others	22.5	22.4	23.4	1.48	1.45	1.50	1.50	33.2	32.5	34.7	35.1
SORGHUM											
World	46.0	41.8	43.6	1.40	1.32	1.27	1.28	64.5	55.0	55.6	55.6
United States	5.6	4.3	3.6	4.25	4.39	3.80	3.80	23.8	18.8	13.9	13.9
Total Foreign	40.4	37.5	39.9	1.01	0.96	1.04	1.04	40.7	36.2	41.7	41.7
Argentina	1.0	1.0	1.0	3.10	3.00	3.04	3.00	3.1	3.0	3.5	3.0
Australia	0.8	0.7	0.9	1.85	1.82	1.98	1.98	1.4	1.4	1.8	1.8
China	1.9	1.9	1.8	2.87	2.91	2.94	2.94	5.4	5.4	5.3	5.3
India	15.6	15.0	16.2	0.57	0.57	0.68	0.71	8.9	8.6	11.0	11.5
Mexico	1.4	1.4	1.4	3.19	2.91	2.91	2.91	4.3	4.0	4.0	4.0
Nigeria	4.5	4.3	4.4	0.80	0.67	0.80	0.80	3.6	2.9	3.5	3.5
South Africa	0.3	0.3	0.3	1.53	1.48	1.82	1.82	0.5	0.5	0.6	0.6
Sudan	4.8	3.5	4.0	0.71	0.46	0.55	0.55	3.4	1.6	2.2	2.2
Thailand	0.2	0.2	0.2	1.26	1.10	1.30	1.30	0.3	0.2	0.3	0.3
Others	10.0	9.2	9.7	0.99	0.94	0.98	0.98	9.9	8.7	9.5	9.5

FOOTNOTES AT END OF TABLE

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DECEMBER 1988

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 5 (Continued)

Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---					
	Prel.	Proj.		Prel.	1988/89	Proj.		Prel.	1988/89	Proj.			
	1986/87	1987/88	1988/89	1986/87	1987/88	Nov.	Dec.	1986/87	1987/88	Nov.	Dec.		
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---					

World	25.0	23.6	23.0	1.90	1.85	1.69	1.70	47.5	43.7	39.2	39.0		
United States	2.8	2.8	2.2	2.02	1.94	1.40	1.40	5.6	5.4	3.1	3.1		
Total Foreign	22.2	20.8	20.8	1.89	1.83	1.72	1.73	41.9	38.2	36.1	35.9		
USSR	13.2	11.8	11.5	1.66	1.57	1.43	1.43	21.9	18.5	16.5	16.5		
Maj. Foreign Exporters	3.3	3.5	3.7	2.05	1.96	1.76	1.80	6.7	6.8	6.9	6.7		
Argentina	0.4	0.5	0.4	1.00	1.30	1.27	1.25	0.4	0.7	0.7	0.5		
Australia	1.1	1.3	1.5	1.39	1.32	1.27	1.24	1.6	1.7	1.9	1.8		
Canada	1.3	1.3	1.4	2.53	2.37	2.04	2.10	3.3	3.0	2.9	3.0		
Sweden	0.5	0.4	0.4	3.26	3.63	3.25	3.25	1.5	1.4	1.4	1.4		
Other Foreign	5.8	5.6	5.6	2.31	2.32	2.27	2.27	13.3	12.9	12.8	12.8		
China	0.6	0.6	0.6	1.17	1.20	1.20	1.20	0.7	0.7	0.7	0.7		
Eastern Europe	1.5	1.4	1.5	2.75	2.82	2.58	2.55	4.2	4.0	3.8	3.8		
East Germany	0.2	0.2	0.2	4.09	4.18	3.68	3.68	0.7	0.7	0.6	0.6		
Poland	0.9	0.9	0.9	2.69	2.87	2.48	2.48	2.5	2.5	2.2	2.2		
EC-12	1.9	1.8	1.8	2.94	3.00	3.11	3.15	5.6	5.3	5.6	5.7		
France	0.3	0.3	0.3	3.27	3.72	3.80	3.80	1.0	1.0	1.0	1.0		
West Germany	0.6	0.6	0.6	4.44	4.30	4.42	4.42	2.7	2.4	2.5	2.5		
Finland	0.4	0.4	0.4	2.92	2.86	2.57	2.57	1.2	1.2	1.0	1.0		
Norway	0.1	0.1	0.1	3.15	3.87	2.98	2.98	0.4	0.5	0.4	0.4		
Others	1.2	1.3	1.3	1.04	1.00	1.01	1.01	1.3	1.3	1.3	1.3		
RYE													

World	14.8	15.9	15.3	2.10	2.14	2.01	2.01	31.0	34.0	30.7	30.8		
United States	0.3	0.3	0.2	1.81	1.82	1.56	1.56	0.5	0.5	0.4	0.4		
Total Foreign	14.5	15.6	15.1	2.10	2.15	2.01	2.02	30.5	33.5	30.3	30.4		
USSR	8.7	9.7	9.5	1.74	1.86	1.74	1.74	15.2	18.1	16.5	16.5		
Maj. Foreign Exporter													
Canada	0.3	0.3	0.2	1.93	1.58	1.03	1.05	0.6	0.5	0.3	0.3		
Other Foreign													
Eastern Europe	3.9	4.0	3.9	2.73	2.74	2.51	2.52	10.6	11.0	9.8	9.9		
East Germany	0.7	0.7	0.7	3.54	3.47	2.77	2.77	2.4	2.4	1.8	1.8		
Poland	2.8	3.0	2.9	2.57	2.63	2.47	2.47	7.3	7.8	7.1	7.1		
Czechoslovakia	0.2	0.2	0.2	3.49	3.13	3.23	3.42	0.5	0.5	0.5	0.5		
EC-12	1.0	1.0	0.9	3.02	2.91	3.08	3.08	3.0	3.0	2.8	2.8		
Denmark	0.1	0.1	0.1	4.55	3.74	4.53	4.53	0.5	0.5	0.3	0.4		
West Germany	0.4	0.4	0.4	4.28	3.89	4.17	4.17	1.8	1.6	1.6	1.6		
Others	0.5	0.5	0.5	1.83	1.80	1.93	1.93	1.0	1.0	0.9	0.9		

1/ Total of barley, corn, sorghum, oats, and rye shown below plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.

Table 7

Oilseeds Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1988/89	Proj.		Prel.	1988/89	Proj.	
	1986/87	1987/88	1988/89	1986/87	1987/88	Nov.	Dec.	1986/87	1987/88	Nov.	Dec.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											

World	51.48	53.89	55.69	1.90	1.91	1.68	1.69	97.91	102.86	94.00	94.25
United States	23.59	23.06	22.99	2.24	2.27	1.79	1.79	52.80	52.33	41.15	41.15
Total Foreign	27.89	30.83	32.69	1.62	1.64	1.60	1.62	45.11	50.53	52.85	53.10
Maj. Foreign Exporters	12.78	14.77	16.50	1.90	1.88	1.85	1.88	24.30	27.70	31.00	31.00
Argentina	3.51	4.26	5.00	1.99	2.32	2.10	2.20	7.00	9.90	11.00	11.00
Brazil	9.27	10.51	11.50	1.87	1.69	1.74	1.74	17.30	17.80	20.00	20.00
Other Foreign	15.11	16.06	16.19	1.38	1.42	1.35	1.37	20.81	22.83	21.85	22.10
Canada	0.38	0.46	0.54	2.50	2.76	2.05	2.15	0.96	1.27	1.10	1.15
China	8.30	8.45	8.30	1.40	1.44	1.33	1.33	11.61	12.18	11.00	11.00
Eastern Europe	0.48	0.53	0.57	1.66	1.31	1.27	1.27	0.80	0.69	0.72	0.72
India	1.39	1.40	1.50	0.60	0.57	0.73	0.87	0.84	0.80	1.10	1.30
Indonesia	0.92	0.95	1.00	0.98	1.00	1.00	1.00	0.90	0.95	1.00	1.00
Mexico	0.34	0.39	0.15	1.94	1.92	2.07	2.07	0.66	0.75	0.30	0.30
Paraguay	0.53	0.62	0.69	1.79	1.63	1.74	1.74	0.95	1.00	1.20	1.20
USSR	0.75	0.78	0.80	0.94	0.91	0.91	0.91	0.70	0.71	0.73	0.73
Others	2.02	2.49	2.65	1.67	1.80	1.77	1.77	3.38	4.47	4.70	4.70
COTTONSEED											

World	29.90	32.50	34.41	0.91	0.95	0.94	0.94	27.11	30.86	32.22	32.36
United States	3.43	4.06	4.71	1.01	1.29	1.12	1.15	3.45	5.23	5.26	5.40
Total Foreign	26.47	28.44	29.70	0.89	0.90	0.91	0.91	23.66	25.63	26.96	26.96
China	4.31	4.84	5.50	1.40	1.49	1.31	1.31	6.02	7.22	7.20	7.23
India	7.28	7.40	8.00	0.44	0.41	0.47	0.44	3.22	3.05	3.74	3.55
Pakistan	2.51	2.57	2.57	1.05	1.15	1.11	1.11	2.64	2.95	2.85	2.85
USSR	3.48	3.53	3.45	1.40	1.27	1.43	1.45	4.87	4.49	4.87	5.02
Others	8.91	10.10	10.18	0.78	0.79	0.82	0.82	6.91	7.93	8.30	8.31
PEANUTS											

World	18.39	17.52	18.90	1.11	1.13	1.16	1.17	20.45	19.76	21.55	22.05
United States	0.62	0.63	0.67	2.70	2.62	2.81	2.81	1.68	1.64	1.87	1.87
Total Foreign	17.77	16.89	18.23	1.06	1.07	1.10	1.11	18.77	18.12	19.68	20.18
Brazil	0.14	0.10	0.10	1.37	1.70	1.50	1.50	0.20	0.17	0.15	0.15
China	3.25	3.02	3.03	1.81	2.04	1.91	1.91	5.88	6.17	5.80	5.80
India	7.15	6.20	7.50	0.85	0.77	0.94	0.97	6.06	4.80	6.80	7.30
Senegal	0.81	0.85	0.79	1.04	1.14	1.02	1.02	0.84	0.96	0.80	0.80
South Africa	0.16	0.21	0.22	0.73	1.00	1.00	1.00	0.12	0.21	0.22	0.22
Sudan	0.52	0.55	0.55	0.87	0.73	0.73	0.73	0.45	0.40	0.40	0.40
Others	5.74	5.97	6.05	0.91	0.91	0.91	0.91	5.23	5.41	5.51	5.51

CONTINUED

Table 7 (Continued)

Oilseeds Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---			
	Prel. Proj.			Prel. 1988/89 Proj.				Prel. 1988/89 Proj.			
	1986/87	1987/88	1988/89	1986/87	1987/88	Nov.	Dec.	1986/87	1987/88	Nov.	Dec.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	14.12	14.84	15.20	1.36	1.39	1.39	1.40	19.25	20.61	21.31	21.28
United States	0.79	0.72	0.69	1.53	1.65	0.92	0.92	1.21	1.18	0.63	0.63
Total Foreign	13.32	14.13	14.51	1.35	1.38	1.41	1.42	18.04	19.43	20.68	20.65
Argentina	1.80	2.06	2.40	1.39	1.36	1.32	1.33	2.50	2.80	3.30	3.20
China	1.11	0.89	1.00	1.39	1.40	1.45	1.45	1.54	1.24	1.45	1.45
EC-12	2.15	2.32	2.08	1.53	1.70	1.89	1.97	3.28	3.93	4.03	4.10
East Europe	1.33	1.38	1.34	2.15	1.74	1.73	1.73	2.86	2.39	2.31	2.31
USSR	3.85	4.16	4.25	1.37	1.46	1.48	1.48	5.26	6.08	6.30	6.30
Others	3.09	3.33	3.45	0.84	0.90	0.95	0.95	2.60	3.00	3.29	3.29
RAPESEED											
World	14.59	16.20	16.55	1.33	1.42	1.31	1.31	19.46	22.95	21.74	21.76
Total Foreign	14.59	16.20	16.55	1.33	1.42	1.31	1.31	19.46	22.95	21.74	21.76
Canada	2.64	2.67	3.65	1.43	1.44	1.15	1.16	3.79	3.85	4.20	4.24
China	4.92	5.27	4.70	1.20	1.25	1.21	1.21	5.88	6.61	5.70	5.70
EC-12	1.27	1.86	1.85	2.91	3.20	2.80	2.85	3.69	5.95	5.25	5.28
East Europe	0.96	0.93	0.88	2.38	2.31	2.36	2.36	2.28	2.14	2.08	2.08
India	3.73	4.10	4.00	0.71	0.76	0.75	0.75	2.64	3.10	3.00	3.00
Others	1.08	1.37	1.47	1.10	0.95	1.01	0.99	1.19	1.31	1.51	1.46
FLAXSEED											
World	4.33	4.17	4.02	0.62	0.55	0.45	0.45	2.69	2.28	1.84	1.80
United States	0.28	0.19	0.10	1.06	1.01	0.95	0.95	0.29	0.19	0.09	0.09
Total Foreign	4.06	3.98	3.93	0.59	0.52	0.44	0.44	2.40	2.09	1.75	1.71
Argentina	0.75	0.69	0.55	0.83	0.80	0.80	0.82	0.62	0.55	0.48	0.45
Canada	0.76	0.59	0.55	1.36	1.23	0.77	0.76	1.03	0.73	0.42	0.41
India	1.23	1.35	1.35	0.28	0.30	0.30	0.30	0.34	0.40	0.40	0.40
USSR	1.05	1.07	1.20	0.22	0.21	0.22	0.22	0.23	0.23	0.26	0.26
Others	0.28	0.28	0.28	0.63	0.65	0.66	0.66	0.18	0.18	0.19	0.19
MAJOR OILSEEDS TOTAL	132.81	139.12	144.77	1.41	1.43	1.33	1.34	186.88	199.33	192.66	193.50
COPRA	--	--	--	--	--	--	--	4.80	4.39	4.73	4.73
PALM KERNEL	--	--	--	--	--	--	--	2.63	2.69	2.90	2.90
TOTAL OILSEEDS	--	--	--	--	--	--	--	194.30	206.41	200.28	201.12
PALM OIL *	--	--	--	--	--	--	--	8.10	8.58	9.32	9.32

Table 8

Cotton Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1988/89	Proj.		Prel.	1988/89	Proj.	
	1986/87	1987/88	1988/89	1986/87	1987/88	Nov.	Dec.	1986/87	1987/88	Nov.	Dec.
<hr/>											
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	29.9	32.3	34.5	513	543	532	532	70.4	80.5	84.0	84.3
United States	3.4	4.1	4.7	618	791	686	702	9.7	14.8	14.8	15.2
Total Foreign	26.5	28.2	29.8	499	507	507	505	60.7	65.7	69.1	69.1
Maj. Foreign Exporters	12.1	12.8	13.5	749	763	750	754	41.5	45.0	46.4	46.7
Australia	0.1	0.2	0.2	1446	1190	1188	1306	1.0	1.3	1.2	1.2
Central America 1/	0.1	0.1	0.1	814	811	873	873	0.4	0.4	0.4	0.4
China	4.3	4.8	5.5	824	876	772	772	16.3	19.5	19.5	19.5
Egypt	0.4	0.4	0.4	909	845	846	846	1.9	1.6	1.6	1.6
Mexico	0.2	0.2	0.3	926	956	1025	1025	0.6	1.0	1.2	1.2
Pakistan	2.5	2.6	2.6	527	573	555	555	6.1	6.8	6.6	6.6
Sudan	0.4	0.3	0.3	468	416	435	435	0.8	0.6	0.6	0.6
Turkey	0.6	0.6	0.7	885	916	910	910	2.4	2.5	3.0	3.0
USSR	3.5	3.5	3.5	762	700	794	801	12.2	11.3	12.4	12.7
Major Importers 2/	0.3	0.3	0.4	930	828	879	837	1.4	1.2	1.7	1.6
Other Foreign	14.1	15.1	15.9	275	281	290	285	17.8	19.4	21.0	20.8
Argentina	0.3	0.5	0.5	318	547	376	376	0.5	1.3	0.8	0.8
Brazil	2.2	2.3	2.4	303	322	315	315	3.0	3.4	3.5	3.5
India	7.3	7.4	8.0	222	207	234	223	7.4	7.0	8.6	8.2
Syria	0.1	0.1	0.2	874	835	933	910	0.6	0.5	0.6	0.7
Others	4.1	4.7	4.8	329	334	343	343	6.3	7.2	7.6	7.6

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

DECEMBER 1988

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 9

NOTE: The table below presents a 7-year record of the differences between the Dec. projections and the final estimates. Using world wheat production as an example, changes between the Dec. projections and the final estimates have averaged 5.8 million tons (1.2 percent) ranging from -10.2 to 6.1 million tons. The Dec. projection has been below the final estimate five times and above two times.

RELIABILITY OF DECEMBER PRODUCTION PROJECTIONS

COMMODITY AND REGION	: DIFFERENCES BETWEEN PROJECTION AND FINAL ESTIMATE, 1981/82-87/88 1/							
	: AVERAGE	: AVERAGE	: Difference		: BELOW	: ABOVE		
	: PERCENT		: ---MILLION METRIC TONS---		: NUMBER OF YEARS	: 2/		
WHEAT	:	:	:	:	:	:		
WORLD	: 1.2	: 5.8	-10.2	6.1	: 5	: 2		
U.S.	: 0.6	: 0.4	-1.2	0.1	: 6	: 1		
FOREIGN	: 1.4	: 5.8	-10.3	6.3	: 5	: 2		
COARSE GRAINS 3/	:	:	:	:	:	:		
WORLD	: 0.8	: 6.0	-19.8	7.9	: 3	: 4		
U.S.	: 1.1	: 2.5	-4.4	2.2	: 6	: 1		
FOREIGN	: 1.0	: 5.7	-15.4	7.6	: 2	: 5		
RICE (MILLED)	:	:	:	:	:	:		
WORLD	: 2.2	: 6.5	-16.2	1.1	: 5	: 2		
U.S.	: 2.5	: 0.1	-0.2	0.2	: 3	: 3		
FOREIGN	: 2.2	: 6.6	-16.2	1.2	: 5	: 2		
SOYBEANS	:	:	:	:	:	:		
WORLD	: 2.6	: 2.3	-4.4	3.8	: 3	: 4		
U.S.	: 3.2	: 1.7	-2.7	2.1	: 1	: 6		
FOREIGN	: 4.3	: 1.7	-2.1	1.7	: 4	: 3		
COTTON	:	:	: ---MILLION 480-LB. BALES---		:	:		
WORLD	: 2.5	: 2.1	-6.3	2.2	: 3	: 3		
U.S.	: 2.0	: 0.2	-0.5	0.4	: 2	: 4		
FOREIGN	: 2.8	: 1.9	-6.7	1.8	: 3	: 3		
UNITED STATES	:	:	: ---MILLION BUSHELS---		:	:		
=====	:	:	:	:	:	:		
CORN	: 1.2	: 89	-148	102	: 6	: 1		
SORGHUM	: 2.1	: 19	-53	14	: 4	: 2		
BARLEY	: 1.9	: 10	-12	24	: 4	: 3		
OATS	: 1.3	: 7	-18	16	: 4	: 2		

1/ The final estimate for 1981/82-1986/87 is defined as the first November estimate following the marketing year and for 1987/88 last month's estimate.

2/ May not total seven if projection was the same as the final estimate.

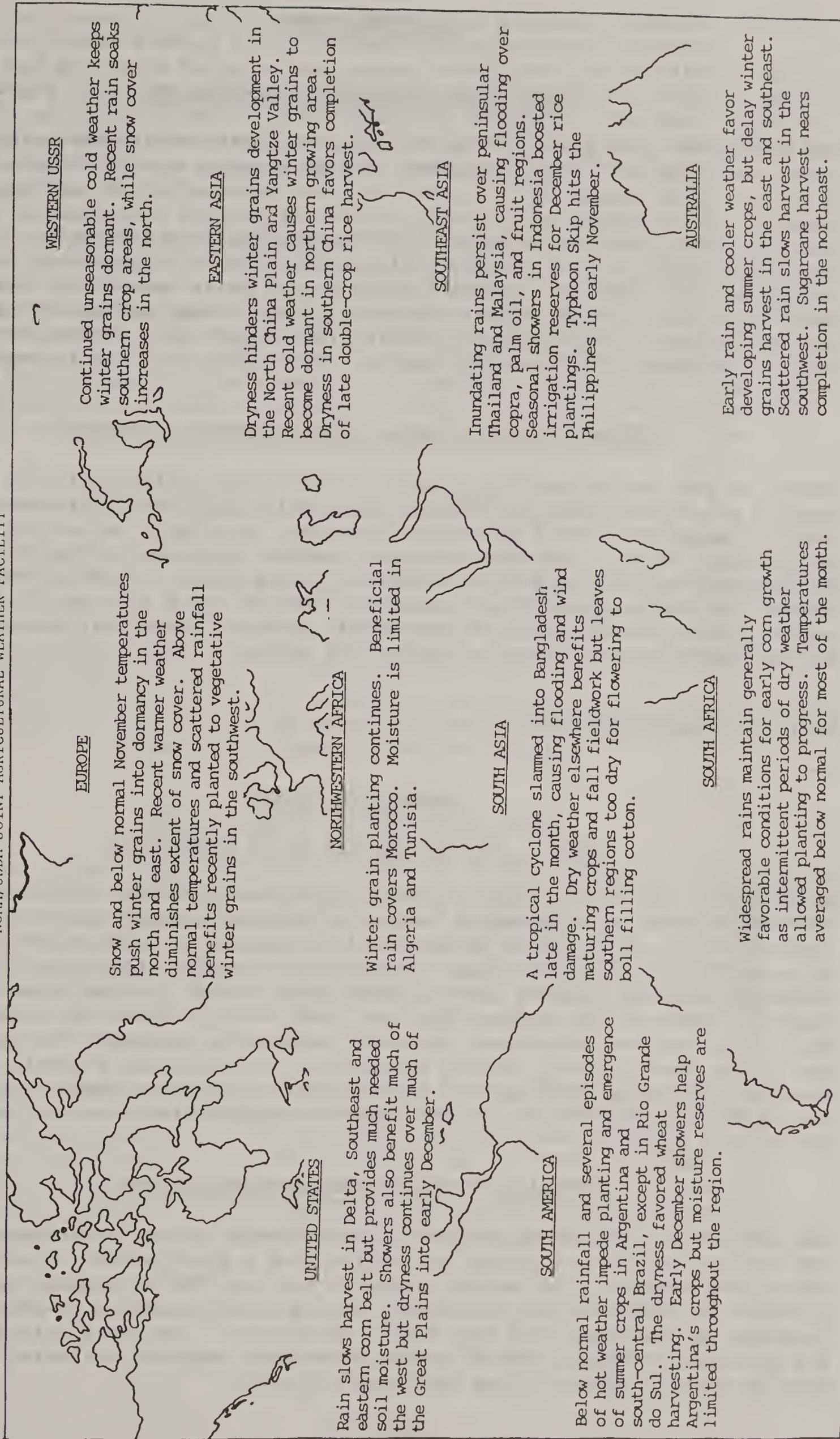
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

December 12, 1988

Date

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY



WEATHER BRIEFS

ALGERIA AND TUNISIA UNFAVORABLY DRY

The crop areas in Algeria and Tunisia have been unfavorably dry early in the winter rainy season. From September through November most of Algeria and much of Tunisia have been as dry or drier than the same period of last year's drought. The southern and eastern portions of Tunisia have received more rain this year than last, but these are not the principal crop areas of Tunisia. Significant amounts of rain have fallen across most of Algeria and Tunisia during the early days of December, which has at least temporarily eased the severity of the current drought. However, winter wheat and barley planting has been delayed by the drought, leaving these crops more vulnerable than usual to episodes of hot and dry weather which may occur late in the season.

ARGENTINA AND SOUTHERN BRAZIL REMAIN HOT AND DRY

Argentina and much of southern Brazil continue to be unfavorably hot and dry despite occasional showers. Showers temporarily lowered temperatures and slightly eased short soil moisture conditions, especially in central Argentine crop areas. However, the overall crop prospects in Argentina and Brazil's Parana state remain guarded, and time is running short for conditions to improve before permanent yield losses will occur. On a more positive note, rainfall has improved conditions in Brazil's Mato Grosso, Mato Grosso do Sul, and Sao Paulo states, but more rainfall is needed.

David N. Secora (202) 475-5134

PRODUCTION BRIEFS

CHILE: DROUGHT REDUCES WHEAT PRODUCTION

According to the U.S. agricultural attache in Santiago, dry conditions during the winter wheat growing season have significantly reduced wheat yields in the coastal sections of central Chile. Yield estimates in these areas are 40 to 50 percent lower than last year. However, the drought did not cut yields in southern Chile as severely and irrigated wheat yields in some areas of the country are reportedly higher than last year. Total production is expected to be 1.5 million tons, 6 percent less than originally forecast. In addition, due to low wheat prices, reduced incentives, and uncertain economic expectations, wheat producers in southern Chile have postponed preparing new fields for the 1989/90 crop. This suggests that planted area may decline next year.

AUSTRALIA: 1988/89 SUMMER PLANTING UPDATE

The current outlook for Australia's 1988/89 summer crops is favorable despite the influences of early season dry weather and a mixed market situation for cotton and sorghum. The market prospects for the 1988/89 sorghum crop are expected to remain favorably strong, leading to an estimated 14-percent increase in plantings over last year. In contrast, low world cotton prices are expected to impact 1988/89 cotton plantings, reducing estimated planted area by about 14 percent from last year's levels.

The Australian Bureau of Agricultural and Resource Economics (ABARE) reported a substantial fallow acreage in the primary sorghum growing region of Queensland and New South Wales. These areas would allow for potential sorghum expansion where moisture conditions remain favorable. Sorghum planting, which is currently taking place and will be completed in January, has been aided by recent rains. However, more rain is needed to prevent farmers from switching from sorghum to sunflower. It had been hot and dry in eastern Australia during October and early November.

This year's cotton crop, which is grown mostly under irrigation in the same region as sorghum, has reportedly gotten off to the best start in several years. Excellent soil moisture supplies in September, coupled with early heat in October, produced a high level of germination. The low price of cotton on world markets, however, is reported to be diverting "opportunity" growers toward soybeans, corn, and sorghum. Total cotton plantings are expected to decline to 200,000 hectares this season. The ABARE estimates that Queensland cotton plantings will be down 22 percent to 55,000 hectares, while plantings in New South Wales are expected to decline 3 percent to 145,000 hectares.

FRANCE: PACE OF DAIRY BUY-OUT PROGRAM SLOWS

As part of its efforts to stay within the European Community mandated milk delivery quotas, France operates a dairy buy-out program designed to encourage producers from 52 to 63 years of age to retire from dairying. Participants receive an annuity which is based on their previous level of milk production or on their delivery quota. For the current marketing year (April-March 1988/89), the program's goal is to reduce milk production by 450,000 tons, but as of the end of October only 3,100 farmers representing about 125,000 tons of milk had signed up. In the 1987/88 marketing year, 13,215 farmers with 550,000 tons of milk production signed up for the program.

INDIA: RECORD 1988/89 PEANUT CROP

Following an extremely favorable monsoon season, record summer crop production in both peanuts and soybeans is being reported in India. The 1988 southwest monsoon provided consistent and timely rainfall throughout the growing season, creating ideal agricultural conditions in virtually every state. Overall, the soil moisture supply improved dramatically as did regional reservoir reserves, benefiting both summer and upcoming winter crops. The 1988/89 peanut crop is estimated at 7.3 million tons, 52 percent higher than last year's drought-ravaged crop, which was the worst in 15 years.

The kharif or summer peanut crop in Gujarat is currently estimated at 1.8 million tons compared to 200,000 tons a year ago and is helping to fuel prospects for the record crop. In addition, the important southern growing areas in Tamil Nadu, Andhra Pradesh, and Karnataka received excellent late monsoon rains, providing conditions for above-normal yields in the region. Irrigated winter peanuts, grown primarily in Andhra Pradesh, had excellent soil moisture at planting, along with ample reservoir supplies for irrigation.

MALAYSIA: PLANS EXPANSION OF COCONUT PRODUCTION

During the Eighth Annual Palm Oil Familiarization Program, Malaysia expressed its intention to become the world's largest coconut producer by the year 2000. While Malaysia is the third largest producer of copra at present, the Philippines and Indonesia each produce nearly 10 times Malaysia's amount. Malaysia's aspirations are being taken seriously by the United Coconut Association of the Philippines, Inc., which reviewed Malaysia's on-going research, program facilities, and production potential in a recent report to its chairman. The report emphasized Malaysia's achievements, such as: 1) successful tissue culture research to mass-clone coconut; 2) product development program; 3) some 135 collaborative research projects worldwide including those with Japanese, Canadian, Indian, British, and American universities; 4) excellent oil handling facilities; and 5) marketing experience and techniques. In response, the Philippine Coconut Authority reportedly is targeting a 4-million-ton coconut production level (copra terms) by the late 1990's, about double 1988 output.

THAILAND: RICE PRICE SUPPORTS RENEWED FOR 1988/89

The U.S. agricultural attache in Bangkok reports that the government of Thailand has agreed to continue price support measures for paddy rice. These measures include: 1) a paddy mortgage scheme [see WAP 8-88]; 2) subsidized loans to traders and millers; and 3) packing credits to exporters. The paddy mortgage scheme was hardly used in 1987/88 due to high first quarter prices, but it is credited with removing 2.3 million tons of paddy from the market during the peak harvest period in 1986/87. The Bank for Agriculture and Agricultural Cooperatives will provide up to baht 8 billion (US\$320 million) for this year's program, up 60 percent from last year's level.

EC-12: 1988/89 DURUM WHEAT PRODUCTION DOWN

EC-12 production of durum wheat in 1988/89 declined significantly from last year. Production is estimated at 6.6 million tons, down 0.8 million or 11 percent from 1987. The largest durum producers, Italy and France, saw declines in both planted area and yield. Wet, unfavorable conditions during flowering and filling stages affected yields in southern France, while output was reduced in parts of Italy due to unfavorable weather at harvest. Production in Greece, the third major producer, remained stable.

Current EC Durum Crop Estimates

	<u>1987/88</u>	<u>1988/89</u>
	<u>(million metric tons)</u>	
Italy	4.5	3.8
France	1.4	1.2
Greece	1.2	1.2
Others	0.4	0.4
Total EC	7.4	6.6

CANADA: DROUGHT-ASSISTANCE PROGRAM ANNOUNCED

According to the U.S. agricultural counselor in Ottawa, the Canadian Government has announced a special program to aid crop producers hurt by the 1988 drought. Provisions on cost sharing with the provinces and final design of the program have yet to be announced. The program is estimated to cost Can\$850 million and complements a record Can\$800-900 million payment under the federal crop insurance program, over 90 percent of which was drought related. The formula for drought payments will be based on current market prices which are substantially higher than the prices guaranteed under crop insurance for most commodities. The following examples provided by Agriculture Canada give rough estimates of what a producer might receive under the program.

Example 1--Producer in Saskatchewan with 100 percent loss.

CROP	ACRES	PAYMENT PER ACRE	PAYMENT PER CROP
(Canadian Dollars)			
Wheat :	350	40	14,000
Barley :	220	37	8,140
Flax :	120	47	5,640
:			
TOTAL :	690		27,780

Example 2--Producer in Ontario with 40 percent loss.

CROP	ACRES	PAYMENT PER ACRE	PAYMENT PER CROP
(Canadian Dollars)			
:			
Corn :	300	57	17,100
Soybeans :	100	42	4,200
:			
TOTAL :	400		21,300

FEATURE COMMODITY ARTICLES

WORLD SUGAR PRODUCTION

World 1988/89 centrifugal sugar production from sugarbeets and sugarcane is forecast to reach a record high 106.8 million tons (raw value), 3 percent more than last year's 103.5-million-ton outturn. Sugar from cane, forecast at 67.8 million tons, is up 4 percent from the previous year and sugar from beets is up 2 percent to 39.1 million tons.

Sugarcane area harvested for 1988/89 is forecast at 12.9 million hectares, down slightly from a year ago, but the raw material processed at 771 million tons is up 4 percent. The recovery rate, or amount of sugar obtained from the raw material processed, is not expected to change from the 8.8 percent average of the past several years. India, the world's largest producer, is forecast to harvest 3.2 million hectares of cane for centrifugal sugar production. Cane production for centrifugal sugar is forecast at 195 million tons, yielding 10.65 million tons of sugar, including khandsari. Brazil is forecast to harvest 1.95 million hectares of cane for centrifugal sugar, with cane production of 102.5 million tons producing 8.7 million tons of sugar.

Area harvested from sugarbeets in 1988/89 is forecast to total 8.7 million hectares, up 1 percent from last year, but with an expected 2-percent decline in the amount of raw material processed to 291 million tons. The recovery rate of 13.4 percent is expected to be 4 percent more than last year. The Soviet Union, largest sugarbeet producer in the world, is expected to harvest 3.38 million hectares in 1988/89, down 1 percent from a year earlier. The forecast for sugarbeet production is 87 million tons (delivered to processors), down 4 percent from last year's 90.4-million-ton crop. However, raw sugar production is forecast at 10.0 million tons, up nearly 5 percent, reflecting an improved sugar recovery rate.

Franklin E. Hokana, (202) 382-8875

Table 10

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVESTED	SUGARCANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
ARGENTINA <u>2/</u>						
1986/87	160	60.0	9,601	1,107	11.5%	6.92
1987/88	185	58.4	10,800	1,177	10.9%	6.36
1988/89	195	61.5	12,000	1,300	10.8%	6.67
AUSTRALIA						
1986/87	310	82.0	25,413	3,457	13.6%	11.15
1987/88	317	81.0	25,667	3,528	13.7%	11.13
1988/89	330	81.8	27,000	3,650	13.5%	11.06
BRAZIL						
1986/87	1,950	51.3	100,000	8,525	8.5%	4.37
1987/88	1,950	46.2	90,000	8,500	9.4%	4.36
1988/89	1,950	52.6	102,500	8,700	8.5%	4.46
CHINA <u>2/</u>						
1986/87	950	52.9	50,219	4,934	9.8%	5.19
1987/88	859	55.2	47,374	4,113	8.7%	4.79
1988/89	850	52.9	45,000	4,100	9.1%	4.82
COLOMBIA						
1986/87	101	124.2	12,540	1,316	10.5%	13.03
1987/88	101	119.8	12,100	1,338	11.1%	13.25
1988/89	100	120.0	12,000	1,350	11.3%	13.50
CUBA						
1986/87	1,300	53.8	70,000	7,220	10.3%	5.55
1987/88	1,300	50.0	65,000	7,250	11.2%	5.58
1988/89	1,350	50.0	67,500	7,750	11.5%	5.74
DOMINICAN REPUBLIC						
1986/87	180	47.4	8,525	815	9.6%	4.53
1987/88	170	48.8	8,300	700	8.4%	4.12
1988/89	170	48.8	8,300	800	9.6%	4.71
EGYPT <u>2/</u>						
1986/87	82	94.7	7,769	893	11.5%	10.89
1987/88	84	96.7	8,120	938	11.6%	11.17
1988/89	86	95.2	8,190	940	11.5%	10.93

(CONTINUED)

Table 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVESTED	SUGARCANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
FIJI						
1986/87	60	67.8	4,070	502	12.3%	8.37
1987/88	60	66.7	4,000	400	10.0%	6.67
1988/89	60	66.7	4,000	450	11.3%	7.50
GUATEMALA						
1986/87	88	71.9	6,324	658	10.4%	7.48
1987/88	93	71.0	6,600	690	10.5%	7.42
1988/89	93	75.3	7,000	725	10.4%	7.80
INDIA <u>4/</u>						
1986/87	3,055	59.7	182,480	9,474	5.2%	3.10
1987/88	3,300	58.2	192,000	10,000	5.2%	3.03
1988/89	3,200	60.9	195,000	10,650	5.5%	3.33
INDONESIA						
1986/87	310	77.0	23,870	2,024	8.5%	6.53
1987/88	334	70.1	23,400	2,100	9.0%	6.29
1988/89	300	75.0	22,500	1,800	8.0%	6.00
MAURITIUS						
1986/87	80	75.0	6,000	748	12.5%	9.35
1987/88	80	75.0	6,000	733	12.2%	9.16
1988/89	80	75.0	6,000	650	10.8%	8.13
MEXICO						
1986/87	597	69.3	41,372	3,970	9.6%	6.65
1987/88	590	68.1	40,200	3,830	9.5%	6.49
1988/89	580	70.7	41,000	3,850	9.4%	6.64
PAKISTAN <u>2/</u>						
1986/87	369	39.3	14,485	1,332	9.2%	3.61
1987/88	550	36.9	20,300	1,849	9.1%	3.36
1988/89	512	41.0	21,000	2,015	9.6%	3.94
PERU						
1986/87	50	129.6	6,480	580	9.0%	11.60
1987/88	52	125.0	6,500	550	8.5%	10.58
1988/89	55	123.6	6,800	600	8.8%	10.91

(CONTINUED)

Table 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVESTED	SUGARCANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
PHILIPPINES						
1986/87	320	45.0	14,400	1,373	9.5%	4.29
1987/88	300	44.2	13,250	1,250	9.4%	4.17
1988/89	320	46.9	15,000	1,425	9.5%	4.45
SOUTH AFRICA						
1986/87	270	68.8	18,570	2,170	11.7%	8.04
1987/88	265	68.7	18,200	2,120	11.6%	8.00
1988/89	260	71.0	18,460	2,175	11.8%	8.37
SUDAN						
1986/87	40	112.5	4,500	550	12.2%	13.75
1987/88	40	112.5	4,500	550	12.2%	13.75
1988/89	40	112.5	4,500	550	12.2%	13.75
SWAZILAND						
1986/87	35	119.6	4,187	537	12.8%	15.34
1987/88	35	108.6	3,800	456	12.0%	13.03
1988/89	35	108.6	3,800	440	11.6%	12.57
TAIWAN						
1986/87	58	83.3	4,831	515	10.7%	8.88
1987/88	65	98.7	6,413	625	9.7%	9.62
1988/89	60	91.7	5,500	580	10.5%	9.67
THAILAND						
1986/87	554	44.1	24,441	2,639	10.8%	4.76
1987/88	600	45.3	27,190	2,704	9.9%	4.51
1988/89	620	51.6	32,000	3,300	10.3%	5.32
U.S. (HAWAII) <u>3/</u>						
1986/87	34	223.6	7,601	946	12.4%	27.82
1987/88	32	224.1	7,170	888	12.4%	27.75
1988/89	33	228.2	7,530	870	11.6%	26.36
U.S. (MAINLAND) <u>2/</u>						
1986/87	270	69.1	18,649	2,030	10.9%	7.52
1987/88	285	65.9	18,782	2,132	11.4%	7.48
1988/89	289	67.8	19,604	2,155	11.0%	7.46

(CONTINUED)

Table 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVESTED	SUGARCANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
VENEZUELA						
1986/87	103	68.7	7,071	601	8.5%	5.83
1987/88	112	71.0	7,950	610	7.7%	5.45
1988/89	113	70.8	8,000	600	7.5%	5.31
CANE MAJOR PRODUCERS						
1986/87	11,326	59.5	673,398	58,916	8.7%	5.20
1987/88	11,759	57.3	673,616	59,031	8.8%	5.02
1988/89	11,681	59.9	700,184	61,425	8.8%	5.26
OTHER PRODUCERS						
1986/87	1,216	58.9	71,636	6,414	9.0%	5.27
1987/88	1,188	59.2	70,292	6,304	9.0%	5.31
1988/89	1,189	59.5	70,788	6,329	8.9%	5.32
WORLD TOTAL						
1986/87	12,542	59.4	745,034	65,330	8.8%	5.21
1987/88	12,947	57.5	743,908	65,335	8.8%	5.05
1988/89	12,870	59.9	770,972	67,754	8.8%	5.26

1/ Refined cane sugar is converted to a raw value by a factor of 1.07. 2/ Processes beet sugar as well as cane sugar. 3/ Hawaiian cane is harvested every 24 months, consequently yields per hectare are much higher than in countries where cane is harvested every year. 4/ Includes khandsari sugar (native type, semi-white centrifugal sugar).

Table 11

SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVESTED	SUGARBEET YIELD	SUGARBEET PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
BELGIUM-LUXEMBOURG						
1986/87	118	53.0	6,252	1,019	16.3%	8.64
1987/88	112	53.7	6,010	874	14.5%	7.80
1988/89	116	53.4	6,200	990	16.0%	8.53
CHINA <u>2/</u>						
1986/87	520	16.0	8,306	840	10.1%	1.62
1987/88	498	16.3	8,140	650	8.0%	1.31
1988/89	750	13.7	10,300	1,000	9.7%	1.33
CZECHOSLOVAKIA						
1986/87	208	36.1	7,500	862	11.5%	4.14
1987/88	208	36.1	7,500	800	10.7%	3.85
1988/89	208	36.1	7,500	700	9.3%	3.37
DENMARK						
1986/87	70	45.6	3,195	600	18.8%	8.57
1987/88	68	37.8	2,570	421	16.4%	6.19
1988/89	68	45.6	3,100	600	19.4%	8.82
FRANCE						
1986/87	421	50.8	21,387	3,707	17.3%	8.81
1987/88	421	57.5	24,199	3,966	16.4%	9.42
1988/89	421	59.3	24,965	4,295	17.2%	10.20
GERMANY, FEDERAL REPUBLIC						
1986/87	399	50.7	20,233	3,469	17.1%	8.69
1987/88	384	49.6	19,049	2,963	15.6%	7.72
1988/89	386	51.8	20,000	3,400	17.0%	8.81
GERMAN DEMOCRATIC REPUBLIC						
1986/87	205	34.4	7,052	935	13.3%	4.56
1987/88	219	35.1	7,683	950	12.4%	4.34
1988/89	190	34.2	6,500	830	12.8%	4.37
HUNGARY						
1986/87	95	37.0	3,515	467	13.3%	4.92
1987/88	105	38.1	4,000	450	11.3%	4.29
1988/89	105	38.1	4,000	400	10.0%	3.81

(CONTINUED)

Table 11 (Continued)

SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVESTED	SUGARBEET YIELD	SUGARBEET PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
ITALY						
1986/87	277	53.2	14,735	1,868	12.7%	6.74
1987/88	283	52.9	14,970	1,875	12.5%	6.63
1988/89	255	52.9	13,500	1,650	12.2%	6.47
JAPAN <u>2/</u>						
1986/87	72	53.6	3,862	685	17.7%	9.51
1987/88	71	53.9	3,827	680	17.8%	9.58
1988/89	71	53.0	3,760	650	17.3%	9.15
NETHERLANDS						
1986/87	138	55.8	7,707	1,324	17.2%	9.59
1987/88	128	54.1	6,920	1,065	15.4%	8.32
1988/89	122	52.0	6,350	1,100	17.3%	9.02
POLAND						
1986/87	423	33.6	14,217	1,891	13.3%	4.47
1987/88	422	33.3	14,040	1,823	13.0%	4.32
1988/89	412	33.7	13,900	1,800	12.9%	4.37
ROMANIA						
1986/87	270	26.2	7,082	600	8.5%	2.22
1987/88	271	20.3	5,500	450	8.2%	1.66
1988/89	270	24.1	6,500	450	6.9%	1.67
SPAIN <u>2/</u>						
1986/87	180	42.8	7,701	1,093	14.2%	6.07
1987/88	168	46.0	7,729	1,076	13.9%	6.40
1988/89	180	42.8	7,700	1,260	16.4%	7.00
TURKEY						
1986/87	347	30.7	10,660	1,475	13.8%	4.25
1987/88	385	33.0	12,720	1,780	14.0%	4.62
1988/89	325	36.3	11,800	1,600	13.6%	4.92
SOVIET UNION						
1986/87	3,400	23.3	79,300	8,696	11.0%	2.56
1987/88	3,400	26.6	90,400	9,560	10.6%	2.81
1988/89	3,375	25.8	87,000	10,000	11.5%	2.96
UNITED KINGDOM						
1986/87	202	40.2	8,120	1,433	17.6%	7.09
1987/88	201	39.8	8,000	1,335	16.7%	6.64
1988/89	200	40.0	8,000	1,465	18.3%	7.33

(CONTINUED)

Table 11 (Continued)

SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION
BY
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVESTED	SUGARBEET YIELD	SUGARBEET PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
UNITED STATES <u>2/</u>						
1986/87	482	47.5	22,885	3,099	13.5%	6.43
1987/88	506	50.1	25,344	3,590	14.2%	7.09
1988/89	526	43.3	22,788	3,085	13.5%	5.87
YUGOSLAVIA						
1986/87	138	40.6	5,599	870	15.5%	6.30
1987/88	164	37.9	6,209	946	15.2%	5.77
1988/89	128	32.9	4,216	640	15.2%	5.00
BEETS MAJOR PRODUCER						
1986/87	7,965	32.6	259,308	34,933	13.5%	4.39
1987/88	8,014	34.3	274,810	35,254	12.8%	4.40
1988/89	8,108	33.1	268,079	35,915	13.4%	4.43
OTHER PRODUCERS						
1986/87	596	36.9	21,988	3,201	14.6%	5.37
1987/88	580	37.1	21,501	2,972	13.8%	5.12
1988/89	574	39.7	22,781	3,180	14.0%	5.54
WORLD TOTAL						
1986/87	8,561	32.9	281,296	38,134	13.6%	4.45
1987/88	8,594	34.5	296,311	38,226	12.9%	4.45
1988/89	8,682	33.5	290,860	39,095	13.4%	4.50

1/ Refined beet sugar is converted to a raw value by a factor of 1.087.

2/ Processes can sugar as well as beet sugar.

SAUDI BARLEY PRODUCTION

The Saudi Government is changing prices and policies in favor of barley production over wheat according to the U.S. agricultural trade officer in Riyadh, Saudi Arabia. While barley is an imported commodity, greatly increased wheat production has transformed Saudi Arabia into a wheat exporter in recent years. This summer the government took steps to reduce the wheat surplus while promoting self-sufficiency in barley production. The new directives apply only to the six major agricultural companies, together accounting for only about 12 percent of Saudi Arabia's wheat output. These companies are more familiar with barley varieties and production requirements, they can diversify their cropping systems at a lower cost, and they have better overall management than smaller farms. However, it seems unlikely that this summer's policy changes will reduce the level of wheat production for 1989. There has been little or no reduction in the availability of wheat seed for the current planting season, and the U.S. agricultural trade officer estimates that wheat area will be up 13 percent from last year. Barley area is expected to increase 30 percent, but production will probably still fall far short of Saudi Arabia's needs.

In the late 1970's the Saudi Arabian Government, in an effort to promote self-sufficiency in wheat production, initiated a wheat subsidy program. The government paid farmers 3,500 riyals (\$933) per ton of wheat, much above the world wheat price. The effort was very successful, and by 1984 annual production had grown to more than 1.3 million tons. With domestic consumption at 0.8 million tons per year, the government reduced the support price to 2,000 riyals (\$533) during 1984 in order to prevent an expensive wheat surplus. Production continued to increase, however, and with a 1987 wheat crop of 2.4 million tons the cost of the subsidy last year amounted to over \$1 billion.

With the new policies, the wheat support price has been reduced 25 percent to 1,500 riyals (\$400) for the six major publicly held joint-stock agricultural companies. Because of their higher production costs, smaller farmers will still receive 2,000 riyals per ton. Another policy change states that the Grain Silos and Flour Mills Organization will accept a total of only 0.2 million tons of wheat from the six major companies. While the companies are free to produce more, the surplus must be sold in the local market at unprofitable prices. The companies also will be forced to devote a larger share of their land to barley production. For every hectare planted to wheat, one hectare must be planted to barley. The previous ratio was one hectare of barley to every two hectares of wheat.

The nation's wheat and barley production is confined to two areas--a region in north-central Saudi Arabia bordering Iran, and a smaller, highly productive region in the northwest, between Tebuk and the Red Sea coast. All of the grain acreage is under irrigation. A recent report by the Ministry of Planning warned of an impending irrigation crisis, noting that wells are being drilled to a depth of 200 meters, some wells are currently drawing water so hot as to require cooling, existing salinity problems are being ignored, and the supply of irrigation water could be seriously depleted by 1995.

SOUTH KOREAN GRAIN PRODUCTION

South Korea's main grain crops are rice, barley, and corn. USDA's total grain estimate for 1988/89 is 8.8 million tons, an increase of 6 percent over 1987/88, with rice production (rough) representing 92 percent of the total grain crop. Although the area planted in grains was down slightly from last year, unusually warm and sunny summer weather during the growing season led to higher yields. Next year the production of rice and barley is likely to increase again due to attractive government incentives, but production of other grain crops such as wheat and sorghum should remain stable or decline.

Rice

Rice is South Korea's staple food and most important grain crop. Production in 1988/89 is expected to be a near-record 8.1 million tons (rough), 5.8 million tons (milled) on 1.2 million hectares, due to ideal weather during the growing season and the absence of storm damage and insect infestations. South Korea has an estimated 1.4 million hectares suitable for rice planting, accounting for 62 percent of total arable land. Actual planted area has been relatively stable for the past 10 years, ranging from 1.188 million hectares in 1982/83 to 1.262 million hectares in 1987/88. Yields have also varied little over the last decade. Rice is produced nationwide, but the flat areas in the west and southeast account for 80 percent of total production. In the south, rice is part of a double-cropping system where it is transplanted after the harvest of barley, garlic, onions, tobacco, and vegetables. There has been increasing use of mechanical planting, now used on about 40 percent of total planted area. The area of high-yielding indica rice has been slowly declining in response to consumer demand for traditional japonica rice and now represents less than a quarter of total rice area. About three-fourths of rice area is currently irrigated, and there are plans to expand this proportion slightly by 1991.

Barley

Barley is the most important coarse grain produced in South Korea. It is a winter crop and often planted in a double-cropping rotation with rice, and primarily grown in the three southernmost provinces of the country. Production peaked in 1975/76 at 1.8 million tons and then gradually declined, falling to just 0.4 million tons in 1986/87. Many farmers are not growing barley because of high income from the generous rice and tobacco programs, and off-farm sources, while others have shifted to high-value horticultural products. However, MAFF succeeded in reversing the downward trend in production with incentives such as a 10 percent procurement price hike, low interest loans, inexpensive seed and chemicals, and a government commitment to buy all barley offered by farmers. Total barley production increased in 1987/88 to 0.5 million tons and again in 1988/89 to 0.6 million tons, even though planted area stayed below the target set by the government. The production of malting barley, which represents 25 percent of the total barley crop, has been increasing in response to growing demand from the brewing industry, while food barley production will likely continue to fall.

Corn

Corn is grown primarily in the eastern mountainous province of Kwangwon, which accounted for almost 80 percent of total production in 1987. Total corn production in 1988/89 is estimated at 130,000 tons, a slight increase from last year due to higher estimated yields. Planted area and production have been slowly declining since the early 1980's because of limited land availability, migration of farm workers, a preference for alternative upland crops, and poor returns to growers. In an effort to stimulate corn production, the government increased procurement prices in 1988 and promised to purchase all the corn offered for sale by the farmers. Despite these incentives corn production is expected to remain constant or decline.

Wheat

Very little wheat is grown in South Korea today. The removal of wheat price supports in 1984 resulted in a severe production decline. Planted area fell from 26,000 hectares in 1983/84 to around 1,000 hectares in 1988/89, and production dropped during the same period from 112,000 tons to under 4,000 tons. Poor returns to growers and labor shortages during harvesting season are expected to cause wheat production to continue its downward trend.

Sorghum

Sorghum is a minor crop which does not receive government support. Area and production are expected to remain steady at roughly 1,000 hectares and 2,000-3,000 tons for the next several years since farmers have little incentive to increase production.

Agricultural Policy

Agricultural policy in South Korea is intended to support rural welfare, by serving the purpose of strengthening the farming sector of the economy and bridging the income gap between rural and urban residents. To this end, South Korea has provided farmers with generous increases in procurement prices for rice, barley, tobacco, and soybeans as well as other agricultural support programs. For example, the government raised the purchase price for rice by 14 percent for the 1988/89 crop and is expected to raise it between 14-20 percent for the 1989/90 crop. This has helped to encourage production, and it also provides a major part of the farmers' income. Through its support prices and programs the South Korean Ministry of Agriculture, Forestry, and Fisheries (MAFF), has emphasized self-sufficiency in rice production. Over the last few years the country has been able to fulfill its minimum requirements of 5.4 to 5.5 million tons (milled).

Background

The Republic of Korea has an area of 98,480 square kilometers, slightly larger than the state of Indiana. The terrain is mostly rugged and mountainous, with arable land making up only 21 percent of the total area. It has a temperate climate characterized by cold, dry winters and hot summers with abundant rainfall. Roughly a one-fifth of the labor force is engaged in agriculture, fishing, and forestry, a decline from about 33 percent 10 years ago as the result of a continuing population migration from the farming regions in the east and south to industrial areas in the north.

Table 12

REPUBLIC OF KOREA: GRAIN PRODUCTION
1978/79 - 1988/89

	AREA (1000 Hectares)	YIELD (Tons/Ha.)	PRODUCTION (1000 Tons)
Total Grains			
1978/79	1758	5.70	10014
1979/80	1644	5.12	8420
1980/81	1634	4.31	7049
1981/82	1638	5.02	8220
1982/83	1561	5.28	8248
1983/84	1612	5.36	8644
1984/85	1613	5.54	8932
1985/86	1509	5.68	8576
1986/87	1458	5.80	8450
1987/88	1501	5.50	8250
1988/89 DEC	1448	6.06	8778
Rice, Rough			
1978/79	1230	6.79	8352
1979/80	1233	5.90	7274
1980/81	1233	4.85	5984
1981/82	1224	5.84	7149
1982/83	1188	6.15	7307
1983/84	1228	6.20	7608
1984/85	1231	6.47	7970
1985/86	1237	6.35	7855
1986/87	1236	6.37	7872
1987/88	1262	6.02	7596
1988/89 DEC	1221	6.61	8076
Barley			
1978/79	473	3.19	1508
1979/80	359	2.64	948
1980/81	331	2.45	811
1981/82	353	2.43	859
1982/83	317	2.36	749
1983/84	322	2.53	815
1984/85	338	2.38	804
1985/86	237	2.41	571
1986/87	190	2.38	453
1987/88	206	2.51	516
1988/89 DEC	195	2.88	562

Table 12

REPUBLIC OF KOREA: GRAIN PRODUCTION (CONTINUED)

	AREA (1000 Hectares)	YIELD (Tons/Ha.)	PRODUCTION (1000 Tons)
Corn			
1978/79	31	3.23	100
1979/80	32	4.66	149
1980/81	35	4.40	154
1981/82	33	4.39	145
1982/83	28	4.18	117
1983/84	28	3.61	101
1984/85	30	4.43	133
1985/86	26	5.08	132
1986/87	24	4.71	113
1987/88	26	4.89	127
1988/89 DEC	26	5.00	130
Wheat			
1978/79	13	3.23	42
1979/80	13	3.23	42
1980/81	28	3.29	92
1981/82	20	2.85	57
1982/83	20	3.30	66
1983/84	26	4.31	112
1984/85	6	2.83	17
1985/86	3	3.67	11
1986/87	2	2.50	5
1987/88	1	4.00	4
1988/89 DEC	1	4.00	4
Sorghum			
1978/79	5	1.00	5
1979/80	4	1.00	4
1980/81	4	1.00	4
1981/82	4	1.25	5
1982/83	3	1.33	4
1983/84	3	1.00	3
1984/85	3	1.00	3
1985/86	1	2.00	2
1986/87	1	2.00	2
1987/88	1	2.00	2
1988/89 DEC	1	2.00	2

GRAIN PRODUCTION IN NORTHWEST AFRICA Morocco, Algeria, and Tunisia

Agriculture in Morocco, Algeria, and Tunisia is dominated by small scale heavily diversified farming operations. Grain production is predominately dedicated to durum, soft wheat and barley, with output usually being used for on farm consumption. Since the majority of the crops are not sold on the open market, production tends to be a function of weather rather than prevailing prices. Large fluctuations in output are common, due to the sporadic climatic conditions frequently experienced in this region. Government programs, which provide credit and subsidized inputs, are often introduced to improve production incentives. However, these programs have a marginal impact on total output, unless growing conditions in any given year are favorable for crop development.

Current Planting Conditions

Planting progress for the 1989/90 grain crop is behind the average schedule. The winter rainy season in northwest Africa has gotten off to a slow start. Rains were below normal for nearly all areas through October, when planting usually begins. However, precipitation has picked up in some areas throughout November. Morocco has had good rains the past few weeks, with accumulations exceeding last year in the south and normal in the north. Although planting has been a little delayed, soil moisture should now be adequate for sowing.

Algeria has had below normal precipitation since September. Although there have been some showers along the coastal region, much of the inland area remains dry. Low rainfall, accompanied by above normal temperatures, has severely reduced the soil moisture levels. In some areas, conditions are worse than last year, which was a severe drought year for Algeria. Planting progress will continue to be delayed until conditions improve.

Tunisia has also received below normal rainfall so far this season. Although precipitation has fallen in the east and south, the major growing areas in the north and west, are moisture deficient. Some regions are experiencing worse conditions than during last year's drought. Good rains are needed to encourage further planting and crop establishment.

Production Factors

Wheat is predominately grown along the northern coastal areas where precipitation levels are higher. Barley, which is more drought resistant than wheat, is concentrated in the southern areas toward the Sahara. Both crops are mainly planted during October and November, with the onset of the rains, and harvested between April and August depending on the location. Cropping methods tend to be simple. Algeria and Tunisia use a combination of mechanized equipment and animal traction. Machinery parts, however, are sometimes scarce, so areas that rely on mechanization frequently have difficulty in the planting and harvesting process; Morocco depends more heavily on animal traction.

Improved seed is sometimes available, but for the most part seed stocks come from on-farm supplies, which tend to be of poor quality. Chemical inputs are not frequently used and are often improperly applied, due to insufficient training. Producers generally try to limit inputs in order to reduce production costs.

Grain production in northwest Africa is heavily dependent on weather conditions. Annual production is extremely volatile, with output sometimes fluctuating 500 percent per year for a country. Although market conditions may sometimes impact original planting intentions, the amount and distribution of precipitation is predominately the deciding factor for total production. Rainfall is very sporadic and spatially inconsistent. Drought conditions occur frequently, either throughout or within a crop season. It is common to have regional droughts, while other areas, within the same country, will experience excellent weather. Morocco often receives hot dry "chergui" winds which originate in the desert, prematurely desiccating established crops. Although irrigation is used in some areas to alleviate drought stress, it is very limited and often insufficient. In Morocco, 25 percent of the grain area is irrigated, but there are frequent water shortages and the schemes are located on poor soils. Consequently, irrigated yields are not significantly greater than to rain-fed yields. Tunisia only irrigates 3 percent of planted grain area and Algeria is currently working on plans to develop irrigation schemes.

Production Policy

Northwest Africa's grain production is well below consumption demands. Insufficient supply has led the governments of Morocco, Algeria, and Tunisia to implement policies promoting increased agricultural output. All three countries have subsidized the usage of quality seed and fertilizer, provided loans and credit, and in some cases offered above market prices for production. Algeria has been moving toward privatization of public farms in an effort to increase output. Although these policies increase production incentives, problems are often experienced with administration and high expenses. These problems, coupled with unpredictable weather conditions, result in continually inconsistent production and grain supplies. Although farmers may apply for farm credit and purchase subsidized inputs or seed, production is poor regardless of input usage, if the precipitation levels are low.

Tamara Warner, (202) 475-5139

Table 13

MOROCCO: GRAIN PRODUCTION
1978/79 - 1988/89

	AREA (1000 Hectares)	YIELD (Tons/Ha.)	PRODUCTION (1000 Tons)
Barley			
1978/79	2389	0.97	2326
1979/80	2168	0.87	1886
1980/81	2150	1.03	2210
1981/82	2228	0.47	1039
1982/83	2047	1.14	2334
1983/84	2151	0.57	1228
1984/85	2126	0.66	1405
1985/86	2383	0.93	2225
1986/87	2472	1.44	3563
1987/88	2315	0.67	1543
1988/89 DEC	2552	1.37	3501
Wheat			
1978/79	1754	1.07	1877
1979/80	1657	1.08	1797
1980/81	1713	1.06	1811
1981/82	1647	0.54	892
1982/83	1686	1.30	2183
1983/84	1976	1.00	1971
1984/85	1856	1.07	1989
1985/86	1894	1.08	2050
1986/87	2226	1.71	3809
1987/88	2288	1.06	2427
1988/89 DEC	2332	1.73	4034
Total Grains			
1978/79	4604	1.02	4673
1979/80	4325	0.94	4044
1980/81	4348	1.02	4437
1981/82	4326	0.48	2077
1982/83	4238	1.15	4872
1983/84	4652	0.76	3529
1984/85	4456	0.84	3723
1985/86	4774	0.98	4698
1986/87	5173	1.51	7802
1987/88	5066	0.85	4320
1988/89 DEC	5376	1.49	7997

Table 14

ALGERIA: GRAIN PRODUCTION
1978/79 - 1988/89

	AREA (1000 Hectares)	YIELD (Tons/Ha.)	PRODUCTION (1000 Tons)
Barley			
1978/79	1108	0.47	515
1979/80	809	0.57	457
1980/81	945	0.84	794
1981/82	1297	0.63	818
1982/83	815	0.60	483
1983/84	718	0.62	444
1984/85	1172	1.11	1295
1985/86	1200	1.08	1300
1986/87	1212	0.89	1083
1987/88	1300	0.69	900
1988/89 DEC	1200	0.79	950
Wheat			
1978/79	2565	0.45	1154
1979/80	1945	0.56	1081
1980/81	2071	0.73	1512
1981/82	2074	0.62	1295
1982/83	1637	0.60	977
1983/84	1400	0.57	794
1984/85	1724	0.96	1646
1985/86	1735	0.96	1660
1986/87	1520	0.81	1230
1987/88	1600	0.64	1020
1988/89 DEC	1500	0.60	900
Total Grains			
1978/79	3805	0.45	1709
1979/80	2887	0.56	1622
1980/81	3182	0.76	2418
1981/82	3509	0.62	2186
1982/83	3568	0.59	1525
1983/84	2224	0.58	1289
1984/85	3049	1.00	3051
1985/86	3127	1.00	3089
1986/87	2872	0.84	2404
1987/88	3054	0.66	2001
1988/89 DEC	2843	0.68	1932

Table 15

TUNISIA: GRAIN PRODUCTION
1978/79 - 1988/89

	AREA (1000 Hectares)	YIELD (Tons/Ha.)	PRODUCTION (1000 Tons)
Barley			
1978/79	497	0.40	200
1979/80	642	0.42	270
1980/81	382	0.78	296
1981/82	443	0.61	270
1982/83	395	0.86	339
1983/84	631	0.48	303
1984/85	580	0.54	312
1985/86	821	0.84	686
1986/87	241	0.55	132
1987/88	639	0.84	537
1988/89 DEC	151	0.42	63
Wheat			
1978/79	1138	0.66	750
1979/80	1134	0.60	680
1980/81	853	1.02	869
1981/82	783	1.23	963
1982/83	714	1.28	916
1983/84	931	0.66	618
1984/85	900	0.79	711
1985/86	1033	1.34	1380
1986/87	540	0.88	474
1987/88	971	1.40	1360
1988/89 DEC	299	0.74	220
Total Grains			
1978/79	1639	0.58	951
1979/80	1776	0.54	950
1980/81	1235	0.94	1165
1981/82	1226	1.01	1233
1982/83	1109	1.13	1255
1983/84	1563	0.59	922
1984/85	1481	0.69	1024
1985/86	1855	1.11	2067
1986/87	782	0.78	607
1987/88	1611	1.18	1898
1988/89 DEC	451	0.63	284

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